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Discount Store News®

THE NEWSPAPER OF DISCOUNT RETAILING

VOL. 25, NO. 20 | Published Biweekly, Every Other Monday, Monthly in December, by Lebhar-Friedman Inc. | $2 per copy | October 13, 1986

Wal-Mart, Supermarket Test 'Hypermarket' Idea

BENTONVILLE, Ark. — Wal-Mart has teamed up with a Texas supermarket company to test a new discount store format: huge full-line hypermarket-type units to be called Wal-Mart Super Centers.

Industry observers suggested that Wal-Mart would position the proposed 150,000-sq.-ft.-plus stores as one-stop shopping centers in major metro markets. They would be the consumer counterpart to the businessman-oriented Sam's Wholesale Clubs that company executives had previously described as a "metro market strategy" for Wal-Mart.

Traditional Wal-Marts were a small town strategy, the executives said.

The discounter and Cullum Cos., a Dallas-based supermarket and drug store operator, have reached an agreement in principle to set up a jointly owned venture called Wal-Mart Super Centers Inc. to run the proposed combination food and general merchandise stores.

Executives of both companies said it was premature to

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K mart's 5-Year Expansion Focuses on Specialty Chains

TROY, Mich.— Diversification is the key to K mart Corp.'s long-range expansion plan, which would add 150 discount stores and 840 specialty stores to its lineup by 1990.

With that in mind, K mart president Joseph Antonini told a group of analysts here that the corporation's projection to have 18% of sales generated by its specialty divisions by the end of the decade "is still very conservative."

On the specialty chain front, the corporation's five-year plan calls for opening 250 more Pay Less Drug Stores in addition to its current base of 192; adding 130 Builders Square stores to the existing 56 units; expanding the 986-store Waldenbooks chain with 360 new stores; and opening 100 Canadian Bargain Harold stores.

K mart's specialty operations also include the Designer Depot off-price operation and its two cafeteria chains, Furr's and Bishop's.

K mart will add 4,000 sq. ft. of selling space to apparel areas in 800 of its stores over the next five years as part of the push to improve overall productivity. (Shown is Southfield, Mich.)(DSN photo)

Store expansion opportunities are obviously much slimmer for the giant 2,200-unit discount store chain. The push to get better productivity out of existing stores will see apparel sections expanded by 4,000 sq. ft. in 800 of K mart's metropolitan market stores.

Broader assortments in such "power departments" as

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Hyundai Drives Computer Rebirth among Discounters

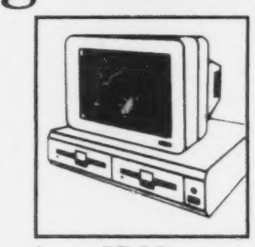
By MARY ELLEN KELLY
Nationwide DSN Report

Can you imagine getting behind the wheel of your low-priced Hyundai, driving to the local K mart and buying a low-priced Hyundai IBM-compatible PC?

This scenerio could come true.

Low-priced, IBM-compatible computers like the new Hyundai model seem to be sparking a rebirth of the home computer market in all kinds of retail outlets.

Caldor and Target have already gone chainwide with the recently introduced Hyundai



Blue Chip PC, and other discounters have also voiced interest in getting into IBM compatibles.

Catalogers Best Products and Service Merchandise as well as one chain, The Federated Group, have said they are currently considering adding IBM-compatibles personal computers to their assortments.

While the mass merchandiser shows promise of becoming

(Continued on page 126)

4th Annual Manager Survey

Top Brands Increase Share

Nationwide DSN Report

Many of discounting's most important brands increased their dominance in 1986, according to the views of store managers.

In the fourth annual *Discount Store News* Top Brands study, managers of both conventional and upscale discount stores were asked to name key brands in 17 merchandise categories. There were few changes among the very highest-ranking brands, but several of the most respected names significantly improved their already-high 1985 results.

Brands that were already runaway favorites in 1985 in many cases actually increased the distance between themselves and runners-up.

In addition, in some of the 17 categories, lower ranked brands showed gains in popularity, displacing some of last year's weaker names.

Among the biggest winners in 1986 were both Black & Decker and Stanley in hardware, Kodak and Polaroid in photography, Rubbermaid in housewares, Crest and Colgate in health and beauty aids, St. Mary's in domestics and Maybelline in cosmetics.

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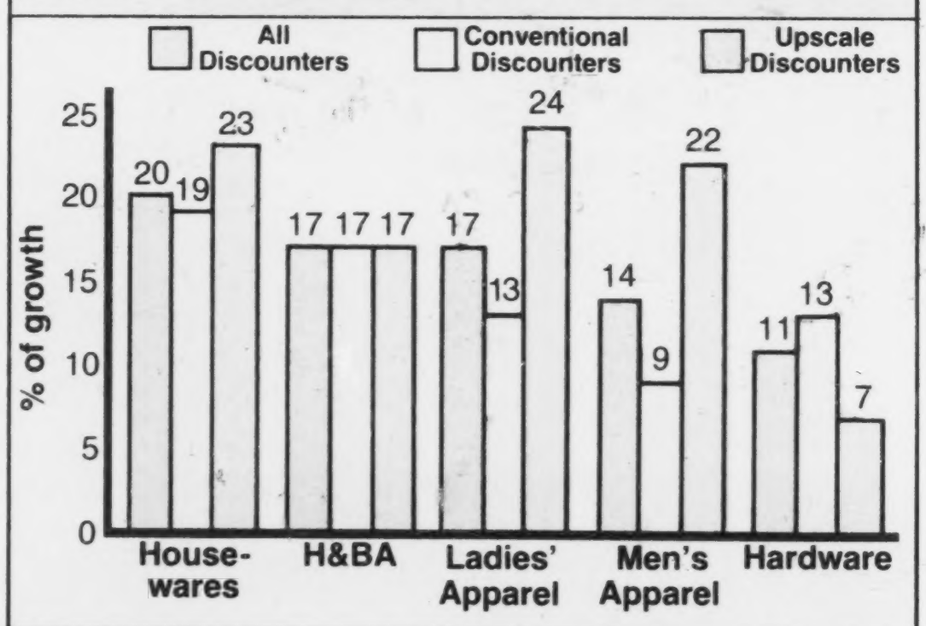
Top Five Departments for Brand Growth



Source: DSN/Leo J. Shapiro & Associates

National labels made their greatest inroads this year in housewares, H&BA, according to a nationally projectable DSN survey of store managers. Of those polled, about 1 in 5 said branded merchandise grew in these areas more than in any other department.

Industry-Wide Group

NMRI to Swallow AGMC

NEW YORK — The National Mass Retailing Institute (NMRI) and the Association of General Merchandise Chains (AGMC) plan to merge and form a trade group that will represent the entire mass merchandising industry.

The NMRI will be the surviving organization and is considering a name change once the merger in completed by about the end of the year, said Richard Hersh, NMRI president.

Two major AGMC members, K mart Corp. and McCrory Stores, have already

Borda

Hersh

committed themselves to joining the NMRI, he said.

There was little overlapping of retailer membership between the 114-member NMRI and the approximately 40-member AGMC. The

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Wholes... Innovat... —page ...

...how: Men's ...ess splashy

FM Supplement Highlights beverage sales —page 55

0024037C DS
MS JEANNE LONG
CONGRESSIONAL INFOR SVC IRE
4520 EAST-WEST HIGHWAY
BETHESDA MD 20814

McCrory Plans a 'Rapid' Phaseout of T. G. & Y. Name

YORK, Pa. — The names Rawdon E. Tomlinson, Les Goslin and Raymond A. Young once held a prominent place in discounting, with their initials, T. G. & Y., splashed across the front of 748 stores. By year-end, the initials will have been totally replaced by McCrory variety stores.

McCrory's parent company, Rapid-American, bought the T. G. & Y. chain for just over $300 million from a group that negotiated a leveraged buyout from T. G. & Y.'s parent company, Household International last December.

As a result of the acquisition, McCrory has rapidly grown from a chain of about 720 variety stores to approximately 1,250. The converted stores will have either the McCrory Stores or J.J. Newberry Stores name, depending on store location.

McCrory expects to have converted 511 former T. G. & Y. stores by the end of the year. More than 200 other stores have been sold to chains like Wal-Mart or

McCrory is moving quickly to convert the 511 T. G. &Y. stores it acquired into McCrory and J.J. Newberry variety stores. The work is expected to be finished by the end of 1986. (DSN photo)

closed. The decision on which stores to convert to a variety format and which to sell or close was based on store size and location, said a McCrory spokesman.

The ideal size for a McCrory store is 20,000 sq. ft., but some former T. G. & Y. stores that were larger have been downsized and the space subleased.

To bring T. G. & Y. assortments in line with the McCrory mix of merchandise basics and staple goods, categories like consumer electronics, arts and crafts, automotive and sporting goods have been scaled back substantially, a McCrory spokesman said. Fabrics in the piece goods section have been replaced with sewing needle and thread in the notions department.

McCrory has stores from

(Continued on page 125)

Stuarts' Cammarano Resigns as President

HOPKINTON, Mass. — Discounter Stuarts Department Stores Inc. has announced the sudden resignation of company president Paul Cammarano.

Chairman Mark Ostrow immediately assumed responsibility for the president's post, pending the appointment of a new Stuarts' head.

Ostrow told *DSN* he expects to have selected a new president by year-end. He has several candidates in mind for the post, most of whom are outside the company, Ostrow said.

When asked about the reasons for Cammarano's abrupt departure and whether he'd had any indication that Cammarano was planning to leave the company, Ostrow reiterated the official Stuarts release, stating that Cammarano had left to pursue other business interests.

At the same time, the chain's stock had plummeted to under $8 as of October 1, from more than $15 at the end of August.

The discounter reported a drop in income for the second quarter, ended Aug. 2, to $284,138 from $434,944 for the period a year ago.

However, sales topped $28 million for the quarter, compared to $22 million for the same period in 1985.

Ostrow cited a "slightly promotional environment" in Stuarts market areas as reason for lowered earnings.

(Continued on page 126)

Pay Less Will Shift Priority to T.G.&Y.s

WILSONVILLE, ORE. — Despite the urgency in rescuing ailing mid-size K marts by converting them to Wonder World, Pay Less NW has reversed priorities for the rest of the year. K mart conversions are being slowed in favor of T.G. & Y.

As a result, only three K marts will be converted by year-end, while 11 T.G. & Y conversions will be opened by the end of November, 1986.

A Pay Less exec says that "T.G. & Y. was a one-time opportunity and we had to move fast." He adds that there will be an upsurge in K mart conversions during the first half of 1987. However, he said that store numbers are not available at this time.

Both K mart and T.G. & Y.'s are in the same size range, with mid-size K marts at 50,000 sq. ft., and T.G. & Y. at 50,000 to 55,000 sq. ft. Neither has pharmacies.

The first K mart conversion, opened in Palestine, Texas (200 miles south of Dallas) in August. The second is opening this fall in Nacogdoches, 75 miles east of Palestine.

The first T.G. & Y. conversion will be in San Benito, Texas, late October or early November. San Benito is 25 miles north of Brownsville and 30 miles west of South Padre Island, a winter resort similar to Miami Beach.

Although the first two K mart conversions are in shopping centers, most will be freestanding. As for T.G. & Y., shopping center and freestanding locations are evenly divided.

Both K mart and T.G. & Y. conversions are centered in the southwest. However, K mart will concentrate primarily in Texas and Oklahoma, while T.G. & Y. encompasses five states: Texas,

(Continued on page 126)

Waldenbooks Institutes Promotion With National Credit Cardholders

STAMFORD, Conn. — Waldenbooks is taking a chance credit cardholders read more than the balance due on their monthly bills.

In August, Waldenbooks inserted three 10%-off coupons in Citibank MasterCard and Visa monthly mailers good for all purchases except discount offers, magazines and gift certificates. The coupons, which reached eight million cardholders nationwide, are valid through the end of October.

At press time, 3,000 of the coupons were being redeemed per week, beginning the second week of August, a company spokeswoman said.

The cost of this first-time venture for Waldenbooks, a division of K mart Corp., is being paid for entirely by Citibank. The bookstore chain absorbs only the 10% discount.

Participating in this credit card mailing "helps increase our exposure, especially to the affluent customer," she said.

Citibank boasts the largest percentage of MasterCard and Visa cardholders, 30%, she added.

Also to Waldenbooks' advantage, the mailing included savings coupons from other companies targeting middle- and upper-income customers: the Limited apparel chain, Cunard cruises, Bailey Banks & Biddle Jewelers and Hertz car rental service.

If this approach succeeds, Waldenbooks will experiment with other direct mail promotions. These probably would be conducted on a regional basis, for example with banks or gasoline credit card companies, to better gauge purchasing habits around the country.

The chain already has committed itself to issuing coupons in Gulf credit card bills on the East Coast, although it has established no time frame for doing so.

America finds it at
Waldenbooks
CitiValues Coupon
Save 10%
Take 10% off a single purchase at any one of the 950 Waldenbooks stores nationwide. Just present your Citibank MasterCard or Visa card for identification along with this coupon for on-the-spot savings.
TERMS AND CONDITIONS
This discount is not valid with any other discount offer or on magazines or gift certificate purchases. This coupon will not be honored retroactively and cannot be redeemed for cash or credit.
Expires October 31, 1986.
CITIBANK

Pacific Stereo to Liquidate After Merger Proposal Fails

EMERYVILLE, Calif. — A plan by U.S. Electronic to take over up to 50 stores of the 64-store Pacific Stereo chain has fallen through and, as a result, Pacific planned to complete liquidation of its assets beginning early this month.

Pacific Stereo filed for Chapter 11 in May and disclosed $36.8 million in debts and $21.6 million in assets.

The Colorado-based U.S Electronic company announced an interest in reopening from 40 to 50 Pacific Stereo stores but was apparently unable to line up the necessary financing.

Paul Buxbaum, executive vice president of Buxbaum Ginsberg & Associates, the consulting firm that is handling the liquidation, said the decision on when to begin liquidating furniture, fixtures and store leases would probably be made October 2. Buxbaum said earlier clearance sales had disposed of all merchandise in the stores.

The liquidation process is expected to continue through the rest of the year. It will probably raise enough capital to cover priority claims, but unsecured creditors may get nothing, Buxbaum said.

Final Sales Signs Posted

Wickes Now Closes 65 Howard Units

MONROE, La. — Wickes took the first concrete step toward dismantling the Howard Discount Store chain by announcing Sept. 18 that 65 of the remaining 87 stores would immediately begin "Going Out of Business" sales. The stores are expected to be closed in November.

The other 22 stores are to continue operating indefinitely, said a Wickes spokesman. He explained that lease agreements made it more feasible to continue those store operations until the leases can be amended or the stores sold to another chain.

Although chains like Wal-Mart and Duckwall-ALCO have expressed interest in acquiring up to 20 Howard's stores each, no agreements have yet been announced, and the spokesman for Wickes said he could not comment on any ongoing negotiations.

Wickes has also announced 291 layoffs affecting Howard's staffers in corporate headquarters, the distribution center and the returns center. No layoffs have yet been announced at store level.

The decision by Wickes to close the stores follows months of negotiations with a Howard's management group led by former president and chief executive officer Jim Dismore on a leveraged buyout. Two offers from the Dismore group for the entire chain were rejected as was an offer for 45 stores.

On Aug. 5, Wickes announced it would begin liquidating the chain piecemeal unless an acceptable offer was made by the end of the month.

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Top Brands

Housewares, H&BA Lead in Growth of National Brands

Nationwide DSN Report

The move by major discount store chains towards greater national brand assortments continues to demonstrate growth in all categories, although there has been a shift in the departments experiencing the greatest growth.

Discount Store News' Fourth Annual Top Brands Survey shows almost 50% of the discount store managers polled nationwide said they carry more national brands now than they did a year ago.

In addition, 69% of managers predicted that national brands will contribute more to future store growth than store brands.

There was little discrepancy among conventional and upscale chains as 69% and 68% of the managers, respectively, said that national brands will contribute more to store growth.

Regionally, the study revealed that 88% of the store managers surveyed in the West said that national brands will contribute more to store growth than the stores' own brand.

The categories showing the strongest brand growth have shifted since the study began in 1983.

Housewares and health and beauty aids were named by store managers as the top two departments in which the number of national brands being carried increased over the past year. Twenty percent of the managers of all discounters cited housewares, while 17% named health and beauty aids.

In last year's study, housewares also was the top department cited by all managers as having the greatest brand growth. However, in 1985, only 14% of managers polled mentioned health and beauty aids as a category experiencing brand growth.

The move of housewares number one on the list indicates that efforts of major discounters to upgrade assortments and enhance the department's fashion appeal remains strong.

The appearance of health and beauty aids as the second ranked department indicates that discounters are continuing to develop and expand the category by improving brand assortments and pricing.

Although ladies apparel placed lower among all discounters in this year's survey, it was cited first among upscale discounters as the department experiencing the greatest name brand growth.

In ladies' apparel, 17% of all managers cited brand growth in the department, compared to 18% and a number two ranking in the 1985 study.

Since 1984, store managers have cited housewares as the department experiencing the greatest growth in brands. Chains, such as Gold Circle, are upgrading brand assortments. (DSN *photo*)

However, among upscalers, 24% (the highest percentage) of the managers polled named ladies' apparel the department where brands are growing. This compares to 15% of upscale discounters in last year's study.

Last year, conventional managers indicated greater brand growth (19%) in ladies apparel than in the 1986 study, when 13% of the group mentioned the department.

The men's apparel category followed the same pattern as ladies' apparel. Last year, 16% of the managers surveyed cited the category as a top department for brand growth.

In 1986, only 14% of all the managers polled named men's apparel a department experiencing brand growth.

However, like ladies' apparel, men's apparel was mentioned by 22% of upscale discounters as a department where brand assortment is growing. In 1985, only 20% of the upscale discounters said the department experienced brand growth.

Among conventional discounters this year, 9% of the managers, compared to 14% last year, said the department experienced name brand growth.

The trend to expand national brands is stronger among conventional chains, according to the study. For example, 83% of the conventional store managers polled, versus 74% of the upscale store managers, reported an increase in the number of brands carried in all departments.

In particular, 91% of all K mart store managers, versus 76% of all Target store managers, said they carried more branded merchandise in '86 than in '85.

This exclusive, nationally projectable study, which was prepared for *DSN* by Leo J. Shapiro & Associates, Chicago, was based on telephone interviews with 300 discount store managers from across the country.

The chains polled were K mart, Wal-Mart, Zayre, Target, Bradlees, Caldor, Venture, Gold Circle, Fred Meyer, Richway and Gemco.

National Survey Reveals Store Managers' Top Brands

Household Chemicals
Tide
Windex
Procter & Gamble
Lysol
Clorox

Housewares
Rubbermaid
Corning
Corelle
SilverStone
Anchor Hocking

Hardware
Black & Decker
Stanley
General Electric
Lucite
Skil

Photo
Kodak
Polaroid
Canon
Minolta
Fuji

Stationery
Mead
Bic
Papermate
Parker
Crayola

Sporting Goods
Wilson
Coleman
Spalding
McGregor
Zebco

Men's Apparel
Wrangler
Lee
Fruit of the Loom
Hanes
Levi's

Ladies' Apparel
Lee
Gitano
Wrangler
Chic
Levi's

Toys
Fisher Price
Mattel
Playskool
Coleco
Milton Bradley

Consumer Electronics
General Electric
Emerson
Panasonic
RCA
Sony

Food/Candy/Snacks
Planters
M&M
Hershey
Mars
Brach's

Domestics
Cannon
J. P. Stevens
St. Mary's
Springs
Kenney's

Automotive
Quaker State
Pennzoil
Fram
Prestone
Havoline

Children's Apparel
Garanimals
Wrangler
Lee
Curity
Garan

Personal Care
Conair
Clairol
General Electric
Vidal Sassoon
Norelco

Health & Beauty Aids
Crest
Colgate
Johnson & Johnson
Procter & Gamble
Revlon

Cosmetics
Maybelline
Revlon
Cover Girl
Max Factor
L'Oreal

Leading brands in 17 merchandise categories were named by store managers nationwide in a poll conducted for *Discount Store News* by Leo J. Shapiro & Associates.

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Many Important Brands Garnered New, Improved Ratings

(Continued from page 1)

Each of the brands were favorites with managers polled in 1985, but showed even more strength this year.

For example, among hardware brands, Black & Decker and Stanley have shared the two top spots on the list of 10 most-frequently cited names since the survey was begun. Last year, B&D was first with citations by 69% of the managers surveyed and Stanley second with 61%. The next most frequently-named brand was Glidden, far behind with a rate-of-mention of 15%.

In the latest survey, B&D scored with 78% of the managers and Stanley with 73%. The nearest competition was General Electric, cited by only one manager in 10.

Kodak achieved the only perfect score this year when every Wal-Mart manager selected it as a top photography brand. Overall, its 85% rate of mention made it one of the most dominant brands in any of the 17 categories.

The number two photography brand, Polaroid, however, actually showed the largest growth. In 1985, Polaroid placed second with a highly-respectable rating of 48%, 12 points higher than third-place Canon. This year the instant photography company pulled further away from the pack with 63%, compared to Canon's third-place finish at 41%.

In housewares, although its numbers were lower than Kodak and Black & Decker scores in their categories, Rubbermaid trounced all other brands in the survey.

A year ago, Rubbermaid led Corning by a margin of 39% to 21%. This year, more than half the managers—53%—selected Rubbermaid as a key name, while Corning still held second place at 21%.

SilverStone cookware, which failed to crack the list of ten top houseware brands last year, leaped to a relatively high fourth-place finish in 1986 with a 14% rating.

SilverStone's emergence on the list is a reflection of the importance of the industry's two biggest chains. While the brand's ratings at other chains were single-digit, 64% of Wal-Mart managers and 19% of their K mart counterparts provided the muscle it needed to make the top ten list.

Two toothpaste brands, Crest and Colgate, showed strong growth in the health and beauty aids category.

Crest finished fifth last year, only two points behind second-place Revlon, with a relatively-strong 23% rating. This year, its 32% rating propelled it to the top in the competitive H&BA category.

Colgate's numbers went from 16% last year—good for sixth place—to 24% and second place in 1986.

In domestics, St. Mary's put strong pressure on Cannon at upscale discounters, even though Cannon held a comfortable lead overall.

With 70% of conventional discounters selecting Cannon as a top brand, Cannon maintained it number one ranking with a 62% score. But Cannon slipped in the eyes of upscalers, dropping from a 57% rating in 1985 to 46%, while St. Mary's experienced a turnaround among upscalers.

Only 16% of the store managers in that discounting segment last year regarded St. Mary's as a significant domestics name. This year that rating nearly tripled to 44%, just two points behind Cannon.

For the second consecutive year, Maybelline stood head and shoulders above all other cosmetics brands, in the eyes of discounters. While it might have seemed hard to improve on its 1985 margin, Maybelline widened the gap between it and second-placed Revlon.

Maybelline boosted its rating three points to 81% while Revlon slipped three points to 51%. That Revlon's score would be enough to provide it with a comfortable lead in many of the 16 other categories only underlines the significance of the Maybelline rating.

Among other categories, seven out of ten brands in household chemicals did not appear on the 1985 list. Only Tide, Windex and the Procter & Gamble Company, the first three finishers, repeated from last year.

Lysol, which tied P&G for third place, Clorox, Fantastic, Dow, Pinesol, Formula 409 and Texize all boosted their ratings from one per cent or less to at least 7% and as high as 18% for Lysol.

Other significant results among top brands in 1986 included:

- A one-two finish for the second consecutive year for Mead and Bic in the stationery category.
- Wilson's 18-point gain in sporting goods, which propelled it above Coleman for the top spot. Wilson placed second last year with a 34% rating, jumping to 52% in 1986.
- Planter's moving into the top spot in food, candy and snacks even though candy brands continued to dominate the category.
- The continued dominance of Fisher-Price and Mattel in toys. The gap between these two top brands and third place, won this year by Playskool, narrowed slightly.
- The decline of Levi's to fifth from third place as a men's apparel brand.
- Gitano's moving from fourth place to second as a ladies' apparel name.
- A continued lack of brand recognition in children's apparel. Garanimals again was the highest-rated brand, but only one in five store managers selected it.
- Conair and Clairol managed to retain their one, two rankings among personal care appliances.
- Emerson strongly challenged General Electric for the top spot on the 1986 consumer electronics list. GE clung to first place, despite dropping two points to a 38% rating, while Emerson moved from third at 26% last year to second at 36%.
- Fram closed in on Pennzoil as the second most popular brand of automotive products. Pennzoil maintained its 35% rating, but Fram climbed from 20% last year to 31% in 1986. Quaker State still dominated the category, boosting its rating from 49% to 57%.

Health & Beauty Aids, as shown in this aisle display at Caldor, Secaucus, N.J., moved up two slots in the Top Brands study to become the No. 2 category experiencing brand growth. (DSN photo)

National Brands Growth by Outlet, 1983-1986

For the third year, housewares has been the department experiencing the most growth in name brands. H&BA continued its upward movement, while ladies' and men's apparel dropped in the survey.

Where Names Brands Are Growing—All Discounters

Department	1986	1985	1984	1983
Housewares	20%	22%	22%	20%
Health & Beauty Aids	17	14	22	16
Ladies' Apparel	17	18	22	26
Men's Apparel	14	16	21	23
Hardware	11	9	10	18
Consumer Electronics	9	6	7	8
Sporting Goods	9	5	8	8
Personal Care	8	5	2	6
Cosmetics	7	9	—	8
Food & Candy	5	2	3	3

Source: Discount Store News/*Leo J. Shapiro & Assoc.*

Discounters Carrying More Brands
(% reporting growth in national brands carried)

Growth	1986	1985	1984	1983
Greater	48%	48%	54%	61%
Same	45	49	43	36
Less	6	2	3	3
Not Answering	1	1	—	1

Source: Discount Store News/*Leo J. Shapiro & Assoc.*

Where Names Brands Are Growing—Conventional Discounters

Department	1986	1985	1984	1983
Housewares	19%	23%	22%	18%
Health & Beauty Aids	17	17	19	16
Hardware	13	8	12	20
Consumer Electronics	13	5	6	8
Ladies' Apparel	13	19	23	25
Men's Apparel	9	14	19	25
Personal Care	9	—	—	—
Sporting Goods	9	5	7	7
Cosmetics	8	12	—	10
Food & Candy	7	—	—	—

Source: Discount Store News/*Leo J. Shapiro & Assoc.*

Where Names Brands Are Growing—Upscale Discounters

Department	1986	1985	1984	1983
Ladies' Apparel	24%	15%	21%	31%
Housewares	23	18	21	28
Men's Apparel	22	20	27	12
Health & Beauty Aids	17	12	34	15
Sporting Goods	9	4	12	5
Hardware	7	11	4	10
Children's Apparel	4	8	8	16
Automotive	4	4	—	—
Personal Care	4	—	—	—
Cosmetics	3	3	—	—

Source: Discount Store News/*Leo J. Shapiro & Assoc.*